

LEAN AND MEAN CI REPORTS: USING POST PROCESSING TOOLS

DAPHNE R. RABAN, *University of Haifa*



The main purpose of CI is to provide timely answers, actionable information, and instrumental information. Since CI products affect decision-making, these reports should be brief and deliver their answers prominently.

The best content can be missed if it is concealed in a large amount of unorganized text. To combat the flood of information we must offer our clients better processed results in leaner reports, while keeping the time devoted to post-processing to a minimum. This article provides ideas for cutting to the chase in managing the results of our online searching.

The rapid increase in the quantity of information available in various media, especially online, makes the CI task harder and harder. To get a taste of this rapid increase see the data published by Lyman and Varian (2003). Over a decade ago we could just search through commercial databases. Since then our toolkit has grown and diversified to contain websites, web directories and databases, email, blogs, virtual communities, you-name-it.

FIND THAT NEEDLE

The incredible abundance of online sources, formal and gray, has turned most of the attention and development efforts to search technologies. The issue at hand is how to find the *needle in the haystack* and how to search through very different sources and formats.

Searching, despite some significant technology advances, is a laborious process involving multiple sources, multiple queries in each source, and a lot of reading to establish whether the information found is useful or merely

interesting. As CI specialists we do the filtering and reading to support targeted answers and analysis. The best way to conduct an efficient search is to:

- thoroughly understand the information need
- break the information need down to concepts
- prepare several search statements combining the concepts
- start combing a list of sources sending queries to each source

EFFICIENT POST-PROCESSING

What happens next? We start our search, find some gems, get lost, forget our initial purpose, and drift away. Realizing we don't have all the answers yet, we revert to searching and the cycle continues. Next steps include re-reading what we have already read to pick out those gems, and then formulating new search statements and running our search in additional resources.

What could save a lot of time in this process? Efficient post processing. The time-consuming, intellectual work of reading should be done once during the search, rather than during and after the search. Collecting pieces of instrumental information and targeted answers to our search questions should be done on-the-fly during the search. Filling information needs in a systematic fashion reduces

the time devoted to searching and leaves more time for information analysis and people relations, two central activities of CI.

SAVING TIME

Here's some suggestions on how to save post-processing time:

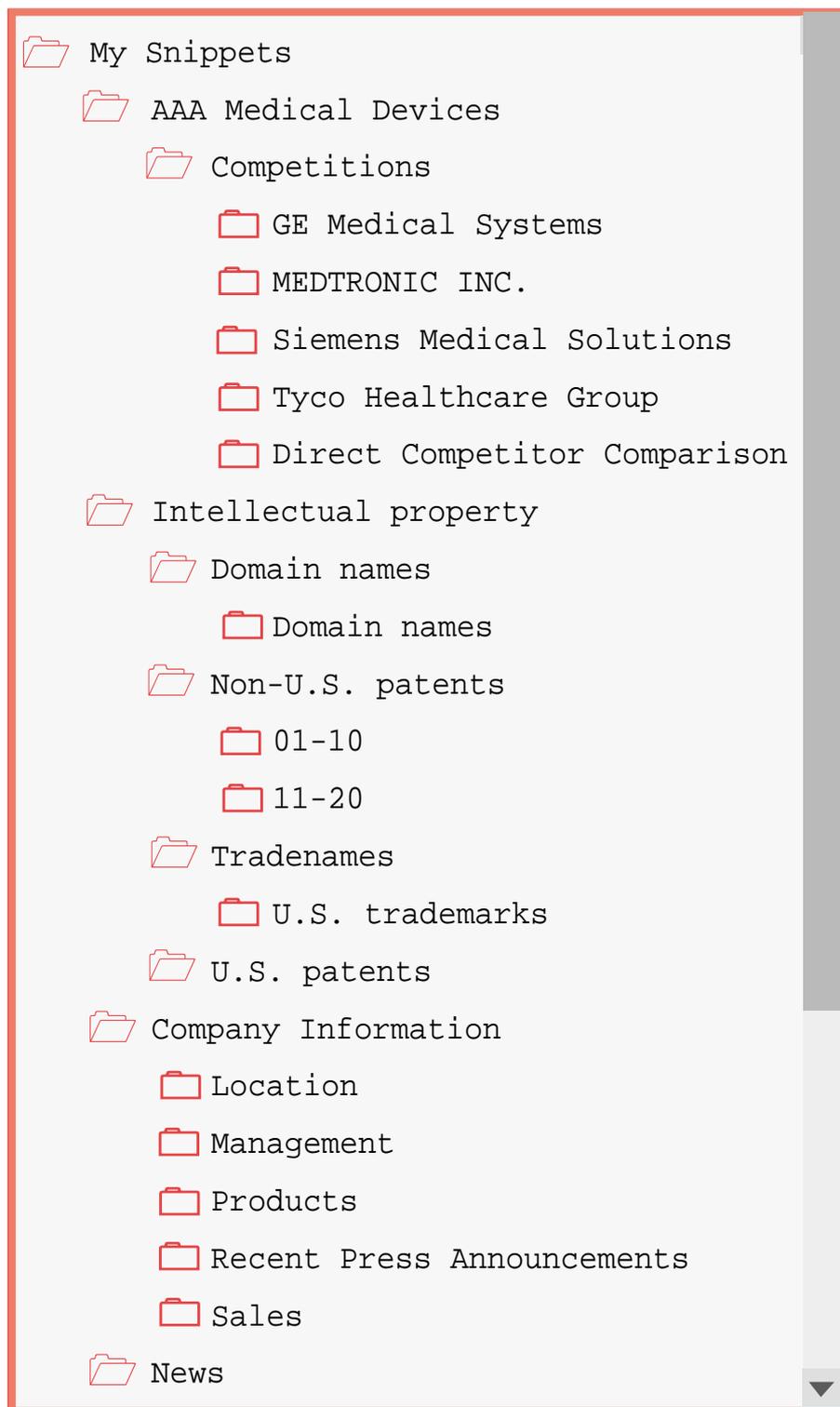
1. Read while searching rather than after the search.
2. Save only the relevant pieces of information.
3. Add value while saving (comments, highlights, metadata).
4. Manage all the information in one location.
5. Generate pre-formatted reports with built-in TOC and bibliography.

Wouldn't it be nice to have a tool that could aid us? Eight of them are listed in Table 1.

Features common to most of these tools include capturing full or partial texts, graphic files, and other formats. Most tools allow a hierarchical organization of the items collected as well as sharing work with others.

TABLE 1: AVAILABLE POST PROCESSING SOFTWARE

Software	Web Site
AnyNotes	http://www.anynotes.com/
AskSam	http://www.asksam.com/
CatchTheWeb	http://www.catchtheweb.com/
CatClip	http://www.catclip.com/
Clip Plus	http://www.crystaloffice.com/clbpinfo.html
NetSnippets	http://www.netsnippets.com/
OnFolio	http://www.onfolio.com
Xerpts	http://www.xerpts.com/



Source: net.snippets.com

Figure 1: Sample snippet folders structure for a typical company report

Net Snippets stand out among this group because of a unique feature: it enables fusing together all the snippets into one customizable report. The remainder of this column focuses on this product, an intuitive Internet Explorer add-on.

NET SNIPPETS

With Net Snippets you can *snip* whatever useful bits of information you find in any type of source or file format and save them including full bibliographic information and metadata for future reference and retrieval. It:

- extracts accurate answers
- saves all information needed to access the full text if needed
- offers a simple solution for working with very different formats
- has a cool report option

Here's how to maximize your use of this tool:

- Open a new Net Snippets folder for the general topic researched.
- When preparing search concepts, open sub-folders for each major concept.
- During the search drag and drop snippets of information, save them in the appropriate folder and with a meaningful name.
- Look at the automatic metadata generated and make appropriate search changes.
- When conducting primary research, create empty snippets to type in your findings, or drag text from Word or another editor into a Net Snippets folder.
- After the search use the feature called *create final paper*: it consolidates the entire folder structure into one structured report.

Preparing the folders and sub-folder in advance keeps you focused on specific search tasks and helps prevent

drifting during the search. Dragging and dropping snippets of information containing vital data or focused pieces of information saves hours of rereading lengthy web pages, database output logs, and previous correspondence.

ORGANIZING YOURSELF

By preparing generic sets of folders for recurring searches you create an easy starting point for many projects. For example, company research or industry overviews are popular CI products that have repeating structures. Figure 1 shows a customized company report structure. The same structure can be used for any company with slight modifications as needed. Figure 2

displays a sample of the table-of-contents in a *final paper* produced automatically from the snippets collected.

The automatically-generated final paper begins with a hyper-linked table of contents, linking each title to its snippet. Then you arrange the collection of snippets in a pre-determined order. The last part of the *paper* is a neat and orderly bibliography.

Net Snippets comes with an editor where you can add text, such as an introduction, comments, or summary. You can highlight important points, modify snippets, or copy the whole paper for further processing in any Windows application. Even within Net

Snippets the paper can be formatted and customized to contain a logo, and the CI unit contact details. To further cut down on editing time, you can automatically apply a desired look and feel consisting of font, size, color etc.

Reports or *final papers* can be sent by email or placed in the corporate intranet. NetSnippets also has a server application which allows collaboration in building the report structure and in entering data as well as delivering the end-product.

Another small but useful feature is importing of Favorites. Having our Favorites in the same place where post processing is done streamlines the whole process of searching and processing the results.

Searching and post-processing involve many steps and repetitive work. Streamlining the results collection process and the final paper preparation is an excellent way to run more efficient searches and save time while achieving the goal of presenting more effective reports that aid in decision making.

REFERENCES:

Lyman and Varian in <http://www.sims.berkeley.edu/research/projects/how-much-info-2003/>.

Daphne R. Raban is a doctoral candidate in the Graduate School of Business, University of Haifa where she also teaches a course in online competitive intelligence in the MBA program. She owns a private business providing information and CI services to industrial companies in Israel. In December 2002 she received the Roger K. Summit scholarship for her academic and professional achievements. Daphne can be reached at draban@univ.haifa.ac.il.

Daphne R. Raban
Graduate School of Business, University of Haifa

AAA Medical Devices

Table of Contents

1. Company Information
 - 1.1. Location
 - 1.2. Management
 - 1.3. Products
 - 1.4. Recent Press Announcements
 - 1.5. Sales
2. Competitors
 - 2.1. GE Medical Systems
 - 2.2. MEDTRONIC INC
 - 2.3. Siemens Medical Solutions
 - 2.4. Tyco Healthcare
 - 2.5. Direct Competitor
3. Intellectual property

Figure 2: Sample (partial) table-of-contents from a 'final paper'